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# **MANDATORY PROVIDENT FUND SCHEMES AUTHORITY**

## **User Manual for the eService**

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## **I. INTRODUCTION**

I.1 The “eService” is an electronic platform established by the Mandatory Provident Fund Schemes Authority (MPFA) to facilitate registered intermediaries to view their registration information, submit and view their annual returns and quarterly return on complaints, and see their submission history on this electronic platform at any time. In addition, subsidiary intermediaries (individuals) can view their last 3-years’ registration history. The MPFA intends to launch more services on this electronic platform in the future.

## II. LOGIN

II.1 A registered intermediary will be given a Login ID and a password upon being registered.

II.2 A registered intermediary can access the eService by clicking on “Intermediary” under “Industry Practitioner” on the right hand side of the menu bar on the homepage of the MPFA website ([www.mpfa.org.hk](http://www.mpfa.org.hk)). The intermediary can then click on the “Principal Intermediary Login” or “Subsidiary Intermediary Login” box under “eService”. Finally, the intermediary needs to input its/his/her Login ID, password and the “CAPTCHA” (a randomly-shown number) that appears on the screen. Please see below:

The screenshot shows the homepage of the Mandatory Provident Fund Schemes Authority (MPFA) website. At the top, there is a navigation bar with links for Home, Useful Links, Subscribe, Glossary, Contact Us, and various accessibility options (A A A, 繁體, 简体, Text, Mobile Version, Mobile Apps, RSS). Below the navigation bar is the MPFA logo and the text "強制性公積金計劃管理局 MANDATORY PROVIDENT FUND SCHEMES AUTHORITY". The main menu includes links for MPFA, MPF System, MPF Education, Member Protection, Supervision, Legislation & Regulations, Public Registers, ORSO, and Information Centre. Below the menu, there are four categories: Employee, Employer, Self-employed Person, and Industry Practitioner. The Industry Practitioner category is highlighted with a red circle around the "Intermediary" link. The central banner features a man holding a document and the text "Consolidate Your MPF Accounts for Easy Management". On the left, there is a "What's New" section with three items: "06/12/2013 An Extract of the MPF Funds with Lower Fund Expense Ratio (December 2013 Issue) has been uploaded", "05/12/2013 MPF Statistics Update: The November 2013 MPF Statistics Update has been uploaded", and "03/12/2013 The November 2013 Prescribed Savings Rate". On the right, there is a "Useful Tools" section with links for Fee Comparative Platform with Performance, Low Fee Fund List, Non-Compliant Employer and Officer Records, MPF Calculators, and Forms. A "More" button is also present.

Useful Links | Subscribe | Glossary | Contact Us | A A A | 繁體 | 简体 | Text | Mobile Version | Mobile Apps | RSS

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Employee Employer Self-employed Person Industry Practitioner

## Industry Information

Home > Industry Practitioner > Intermediary

Useful Tools:

- Forms
- MPF Calculators
- Fee Comparative Platform
- Trustee Service Comparative Platform
- Reference Materials
- List of Approved Trustees and MPF Schemes
- Learn More about MPF Intermediaries

FAQ:

Had a question in mind? Go

Requirements for MPF Intermediaries:

- Registration Requirements: How to register as an MPF intermediary?
- Conduct Requirements: What are the conduct requirements for an MPF intermediary?
- Training Requirements: What are the training requirements for an MPF intermediary?

eService:

- Principal Intermediary Login (Password Required)
- Subsidiary Intermediary Login (Password Required)

What's New:

- Circulars for MPF Intermediaries
- Publications
- Enforcement News

eService Mobile App: For Subsidiary Intermediary Download



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SCHEMES AUTHORITY



## Subsidiary Intermediary

### Login

Login ID:

Password:

[Forgot Password?](#)

**1 7 9 1**

[Refresh](#)

Please enter the number as shown in this box. If you can't see the number clearly, please click refresh to get another set of number.

**SUBMIT**

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Best viewed with Internet Explorer 8.0 or above with 1024 X 768 resolution

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## First Time Login

II.3 For intermediaries registered **before 23 December 2013**, they are required to set a **second password** and this will be used for subsequent logins. Please see below:



中文  
eService

A screenshot of the MPFA eService login interface titled "Subsidiary Intermediary". The interface includes a note about the new password policy, two input fields for entering the new second password, and a "SUBMIT" button. In the background, there is a photograph of three business professionals (two men and one woman) looking at a laptop together. The overall design has orange and yellow accents.

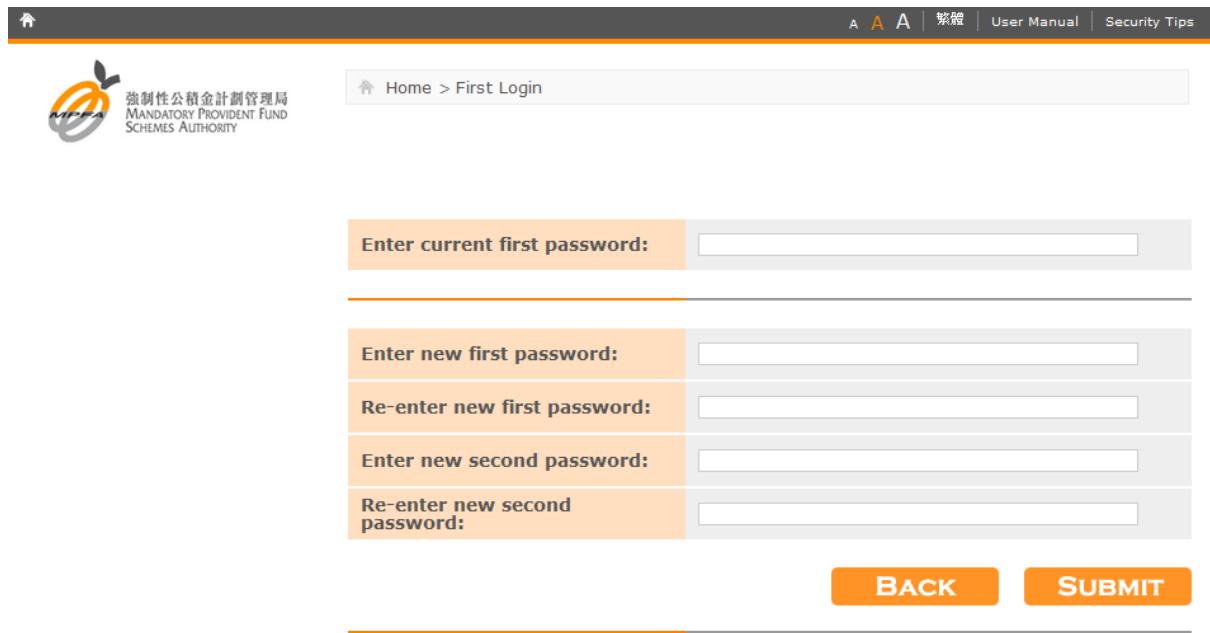
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II.4 For registered intermediaries registered **on or after 23 December 2013**, they are required to set **a first and a second password** and these will be used for subsequent logins. Please see below:



The screenshot shows a web page titled "First Login". At the top, there is a logo for the Mandatory Provident Fund Schemes Authority, followed by links for "Home", "User Manual", and "Security Tips". Below the header, there are four input fields for password entry, each with a corresponding label: "Enter current first password:", "Enter new first password:", "Re-enter new first password:", "Enter new second password:", and "Re-enter new second password:". At the bottom right of the form area are two buttons: "BACK" and "SUBMIT". A note at the bottom of the form area reads: "Please reset your first and second password in your first-time login or after your request of regeneration of first password due to "Forgot Password". These 2 new passwords should be used when you login to eService next time."

## Subsequent Logins

II.5 After inputting the Login ID, password and CAPTCHA, intermediaries will be provided with an option to select a Login Mode, either “One Time Token” or “Second Password” for security reasons. Please see below:

The screenshot shows a web interface for the MPFA eService. At the top, there are links for User Manual, Online Demo, Security Tips, and 中文 (Chinese). The MPFA logo is on the left, and the eService logo is on the right. Below the header, there is a photograph of two men in business attire looking at a laptop screen. To the right of the photo is a login modal window titled "Subsidiary Intermediary". It contains the instruction "Please select LOGIN Mode" with a question mark icon. Two options are presented: "One Time Token" and "Second Password". Both options have a note below them: "You are required to input an email address which you have registered with the MPFA for verification" for One Time Token, and "You are required to input a second password." for Second Password. A yellow padlock icon is located at the bottom of the modal. The background of the page features orange and yellow wavy patterns.

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## One Time Token

II.6 For Principal Intermediaries and Subsidiary Intermediaries (Appointed Long Term Insurance Agents), the contact person's email address registered with the MPFA should first be entered. An email with a one time token will then be sent to the registered email address. The token needs to be entered for a successful login. The token is only valid for 8 minutes. Please see below:



The image shows a screenshot of the MPFA eService website. At the top right, there are links for "User Manual", "Online Demo", "Security Tips", and "中文". The logo of the Mandatory Provident Fund Schemes Authority (MPFA) is on the left, featuring an orange stylized leaf or flower. On the right, there is a "eService" logo with a globe icon. The main content area has a background image of the Hong Kong skyline reflected in the water. A form box titled "Principal Intermediary" is overlaid on the image. The title "LOGIN Mode - One Time Token" is displayed. Below it, a label "Enter Email Address:" is followed by a text input field labeled "Email Address". A descriptive text below the input field says "Please input Contact Person Email Address which you have registered with the MPFA." To the right of the input field is a photograph of a person's hands typing on a keyboard. At the bottom of the form box are two buttons: "BACK" and "SUBMIT".

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II.7 For Subsidiary Intermediaries (Individuals), their personal or business email address registered with the MPFA needs to be entered. A one time token will be sent to that registered email address. The token needs to be entered for a successful login. The Token is only valid for 8 minutes. Please see below:

User Manual | Online Demo | Security Tips | 中文



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**Subsidiary Intermediary**

**LOGIN Mode - One Time Token**

Enter Email Address:

For Subsidiary Intermediary(Individual), please input your Personal Email Address or Business Email Address which you have registered with the MPFA.

For Subsidiary Intermediary(Agency Company), please input your Contact Person Email Address which you have registered with the MPFA.



**BACK**      **SUBMIT**

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II.8 Registered intermediaries who have not registered an email address with the MPFA can only use the second password option to login.

## Second Password

II.9 Registered intermediaries should enter 3 alphanumeric characters (randomly selected by the eService) of the second password previously set by them. Please see below:

The screenshot shows the MPFA eService login interface. At the top right, there are links for 'User Manual', 'Online Demo', 'Security Tips', and '中文'. The MPFA logo is on the left, and the 'eService' logo is on the right. Below the header, there is a large photograph of three business people (two men and one woman) looking at a laptop screen together. To the right of the photo is the login form for a 'Subsidiary Intermediary'. The form title is 'LOGIN Mode - Second Password'. It features a grid for entering a password, with labels '1st', '4th', and '2nd last' indicating the sequence of characters. A 'Forgot Password?' link is also present. Below the grid is a small image of hands typing on a keyboard. At the bottom of the form are 'BACK' and 'SUBMIT' buttons.

User Manual | Online Demo | Security Tips | 中文

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SCHEMES AUTHORITY

eService

Subsidiary Intermediary

LOGIN Mode - Second Password

Enter Second Password

1st    4th    ...    2nd last

Forgot Password?

BACK SUBMIT

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## Successful Login

II.10 There will be a box showing “Terms and Conditions for use of an eService System” after successful login. Intermediaries should read all the terms and conditions carefully and click on “ACCEPT” in order to use the eService functions.

A A A | 繁體 | User Manual | Security Tips | Change Password | Logout



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Home > General Information

### Terms and Conditions for Use of an eService System

The following terms and conditions ("Terms and Conditions") shall apply to the use of the eService System ("System") and related services ("eService") made available by the Mandatory Provident Fund Schemes Authority ("MPFA") for registered intermediaries (as defined in the Mandatory Provident Fund Schemes Ordinance Cap. 485 ("MPFSO") ("Registered Intermediaries")).

For the purposes of these Terms and Conditions, "User" means a Registered Intermediary who has been assigned a login ID and password(s) by the MPFA to use the System and eService.

By clicking "Accept" button, you confirm that you are an authorised User and have read, and agree to be bound by, these Terms and Conditions.

**1. Access rights**

- 1.1 The User undertakes to use its login ID and passwords in accordance with these Terms and Conditions.
- 1.2 The User acknowledges that its login ID and passwords are strictly confidential and personal to the User and must not be disclosed to any other person or unauthorised personnel/third parties. The User shall act in good faith and exercise all diligence in maintaining the confidentiality and security of its login ID and passwords.

Fax No.: 45674567

Address of Principal Place of Business in Hong Kong (English):

A A A | 繁體 | User Manual | Security Tips | Change Password | Logout



強制性公積金計劃管理局  
MANDATORY PROVIDER SCHEMES AUTHORITY

Home > General Information

these Terms and Conditions shall not constitute a waiver of any such rights or remedies.

**11. Entire Agreement**

These Terms and Conditions (and any additional terms referred to herein) set out the terms on which the System and eService are made available to Users.

**12. Applicable Law**

These Terms and Conditions shall be governed by and construed in accordance with the laws of the Hong Kong Special Administrative Region. In the event of any dispute arising from or in connection with these Terms and Conditions, the parties shall irrevocably submit to the exclusive jurisdiction of the courts of the Hong Kong Special Administrative Region.

**13. Conflict**

If there is any inconsistency or conflict between the English and Chinese versions of these Terms and Conditions, the English version shall prevail.

**ACCEPT**

Fax No.: 45674567

Address of Principal Place of Business in Hong Kong (English):

## **Forgotten Password**

II.11 If an intermediary forgets the password, please click on “Forgot Password?” on the Login page. Please see below:

The screenshot shows the login interface for the Subsidiary Intermediary. It features a background image of three business professionals (two men and one woman) looking at a computer screen. The login form includes fields for 'Login ID' and 'Password', and a 'Forgot Password?' link which is circled in red. Below the form is a CAPTCHA box displaying '1791' and a 'SUBMIT' button. The top navigation bar includes links for Mobile App, User Manual, Online Demo, Security Tips, and 中文 (Chinese).

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II.12 For Principal Intermediaries or Subsidiary Intermediaries (Appointed Long Term Insurance Agents), please input the Login ID and the contact person email address which have been registered with the MPFA. The MPFA will then send the new password to the contact person's email address. Alternatively, if no contact person email address has been registered with the MPFA or that email address is forgotten, please click on "HARDCOPY Form RP" to access the form and return it to the MPFA. Please see below:

User Manual | Online Demo | Security Tips | 中文



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SCHEMES AUTHORITY



**Principal Intermediary**

**Forgot Password**

Please input **Contact Person Email Address** which you have registered with MPFA.

Login ID

Email Address

OR

If no email address which you have registered with the MPFA or forgot the email address, please submit **HARDCOPY Form RP** to the MPFA to reset password.

**BACK** **SUBMIT**



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II.13 For Subsidiary Intermediaries (Individuals), please input the Login ID, and the personal or business email address previously registered with the MPFA. The MPFA will then send the new password to that Email Address. Alternatively, if no Email Address has been registered with the MPFA or that registered email address is forgotten, please click on “HARDCOPY Form RP” to access the form and return it to the MPFA. Please see below:

The screenshot shows the MPFA eService login interface. At the top right, there are links for User Manual, Online Demo, Security Tips, and Chinese (中文). The MPFA logo is on the left, and the eService logo is on the right. The main area is titled "Subsidiary Intermediary". It features a "Login" section with fields for "Login ID" and "Password", both with placeholder text ("Your login ID" and "PASSWORD"). A "Forgot Password?" link is also present. Below the login fields is a red four-digit CAPTCHA code "2389" with a "Refresh" button. At the bottom is a large orange "SUBMIT" button. To the left of the login form is a photograph of three professionals in a office setting, two men and one woman, looking at a computer screen together.

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Best viewed with Internet Explorer 8.0 or above with 1024 X 768 resolution

Relevant online demonstrations are available at  
<https://eservices.mpfa.org.hk/eservice/eng/demo.do>

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## **Password Security**

- II.14 Please take necessary measures to keep your passwords safe and secure.
- II.15 Do not allow other people/unauthorized persons to use the passwords.
- II.16 If you notice or suspect that your Login ID and/or password(s) have been lost, stolen or are being used by an unauthorized party, you shall immediately change your passwords, and notify the MPFA.
- II.17 Please avoid using a public internet connection to access the eService.

### III. GENERAL INFORMATION

III.1 Once logged in, intermediaries can view under “General Information”, their registration information previously provided to the MPFA.

III.2 For Principal Intermediaries, there are 5 tab-pages, namely, Basic Information, Regulatee Qualification, Responsible Officer, Compliance Officer and Contact Person. Please see below:

The screenshot shows the MPFA website interface. At the top, there is a navigation bar with icons for font size, language (Traditional Chinese), user manual, security tips, change password, and logout. Below the navigation bar, the logo of the Mandatory Provident Fund Schemes Authority is displayed, along with the text "強制性公積金計劃管理局 MANDATORY PROVIDENT FUND SCHEMES AUTHORITY". A welcome message for "Tai Tai Insurance Company Limited" is shown, along with the last login attempt on "04/12/2014 14:36" which was successful. The main content area is titled "Principal Intermediary" and contains a "General Information" section with tabs for "Basic Information", "Type A Regulatee Qualification", "Responsible Officer", "Compliance Officer", and "Contact Person". The "Basic Information" tab is selected. It displays the following details:

Name:	Tai Tai Insurance Company Limited 大大保險有限公司
MPF Registration No.:	IC999997
Frontline Regulator(s):	Insurance Authority
Status:	Active

Below this, there are fields for Business Registration No. (12345678), Email Address (xxx@taitai.com), Telephone No. (23456789), and Fax No. (45674567). Further down, there are sections for the address of the principal place of business in Hong Kong (English) and Chinese, both of which are listed as "FLT/ROOM 2304 23/F BLOCK A SUCCESS BUILDING 36 SUCCESS STREET CENTRAL HONG KONG" and "香港 中環 成功街35號 成功大廈 A座 23樓 2304室".

III.3 For Subsidiary Intermediaries (individuals), there are 3 tab-pages, namely, Registration Information, Basic Information and Regulatee Qualification. Please see below:

The screenshot shows the website interface for the Mandatory Provident Fund Schemes Authority. At the top, there is a navigation bar with icons for home, font size, and user options (User Manual, Security Tips, Change Password, Logout). Below the navigation bar, the logo of the MANDATORY PROVIDENT FUND SCHEMES AUTHORITY is displayed. The main content area has a header "Welcome C-SI-003719 Last Login Attempt:07/01/2015 09:26 Successful". A breadcrumb navigation shows "Home > General Information". The main title "Subsidiary Intermediary" is followed by a "General Information" section. This section includes a "Print" button and four data rows: Name (Chan Tai Man, 蔣大文), MPF Registration No. (999999), Frontline Regulator(s) (Insurance Authority), and Status (Active). Below this is a tabbed menu with "Registration Information" (selected), "Basic Information" (highlighted in grey), and "Regulatee Qualification". A note states: "Please find below your registration history of MPF intermediary for the past 3 years:". A table is shown with three columns: Registration Date, Revocation Date, and Revocation on Disciplinary Ground. The first row shows 30/12/2012 in the Registration Date column. The sidebar on the left contains links for General Information, CPD Annual Return, View Submission History, and Online Demo.

III.4 For Subsidiary Intermediaries (Appointed Long Term Insurance Agents), there are 3 tab-pages, namely, Basic Information, Regulatee Qualification and Contact Person. Please see below:

The screenshot shows the 'General Information' section of the 'Subsidiary Intermediary' page. On the left, there is a sidebar with three buttons: 'General Information' (selected), 'View Submission History', and 'Online Demo'. The main content area has tabs for 'Basic Information' (selected), 'Regulatee Qualification', and 'Contact Person'. Under 'Basic Information', there are four rows of data: Name (Happy Insurance Agency Limited), MPF Registration No. (A999999), Frontline Regulator(s) (Insurance Authority), and Status (Active). Below this is a section for the 'Address of Principal Place of Business in Hong Kong:'.

Name:	Happy Insurance Agency Limited
MPF Registration No.:	A999999
Frontline Regulator(s):	Insurance Authority
Status:	Active

Address of Principal Place of Business in Hong Kong:

Relevant online demonstrations are available at  
<https://eservices.mpfa.org.hk/eservice/eng/demo.do>

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## IV. QUARTERLY RETURN ON COMPLAINTS AGAINST MPF INTERMEDIARIES

### Quarterly Return on Complaints to be Delivered by MPF Principal Intermediaries

IV.1 Principal Intermediaries can click on the “Quarterly Return on Complaints” button on the left menu bar to submit a quarterly return on complaints to the MPFA.

A A A | 繁體 | User Manual | Security Tips | Change Password | Logout

Home > General Information

Welcome, Tai Tai Insurance Company Limited  
Last Login Attempt: 10/12/2014 15:09 Successful

### Principal Intermediary

#### General Information

Name: Tai Tai Insurance Company Limited  
大大保險有限公司

MPF Registration No.: IC999997

Frontline Regulator(s): Insurance Authority

Status: Active

Print

Business Registration No.:	12345678
Email Address:	xxx@taitai.com
Telephone No.:	23456789
Fax No.:	45674567

Address of Principal Place of Business in Hong Kong (English):  
FIT/ROOM 2304 23/F BLOCK A SUCESS BHU DING 2A SUCESS STREET CENTRAL

## Download the Template of the Quarterly Return on Complaints

IV.2 Please click the “DOWNLOAD” button at the bottom of the page to download the template of the Quarterly Return on Complaints and prepare it in Microsoft Excel program. The Microsoft Excel file should be saved by a file name using the format of “xQYYYY\_Reg.no.”. (Example : 2Q2015\_IC999999)

Last Login Attempt:10/12/2014 14:26 Successful

**Uploading Quarterly Return On Complaints**

General Information

Quarterly Return on Complaints

Annual Return

View Submission History

Online Demo

Year: 2014

Quarter\*: First Quarter

**檔案下載**

是否要開啟或儲存這個檔案?

名稱: Quarterly\_Complaint\_Return\_Template.xls  
類型: Microsoft Office Excel 97-2003 工作表, 1.02...  
從: www.mpfa.org.hk

開啟舊檔(O)     儲存(S)     取消

開啟這類檔案之前,一定要先問我(W)

雖然來自網際網路的檔案可能是有用的,但是某些檔案有可能會傷害您的電腦。如果您不信任其來源,請不要開啟或儲存這個檔案。[有什麼樣的風險?](#)

Email Address:

Attached Return Note: [Browse | Cancel]

To download the template, click DOWNLOAD

Note: Please use the following format xQYYYY\_Reg no. for file name  
(Example: 2Q2015\_IC999999.xls or 2Q2015\_IC999999.xlsx)

\*:Mandatory field

**SUBMIT**

## Input Required Information and Submit

IV.3 Fill in ALL fields on the Quarterly Return on Complaints form and upload the prepared return file by clicking the “Browse” button. Then press the “SUBMIT” button to complete the submission. Once submitted, the information cannot be changed using the eService.

**Uploading Quarterly Return On Complaints**

<b>General Information</b>	<b>Year:</b> 2014
<b>Quarter*:</b>	First Quarter
<b>PI MPF Reg No:</b>	IC999997
<b>PI Name:</b>	Tai Tai Insurance Company Limited
<b>Confirm Nil Return:</b>	<input type="checkbox"/>
<b>Contact Person*:</b>	Ms Chan
<b>Position*:</b>	Manager
<b>Telephone No.*:</b>	34567890
<b>Fax No:</b>	
<b>Email Address:</b>	
<b>Attached Return</b> Note:	1Q2014_IC999997.xls <a href="#">[Browse]</a> <a href="#">[Cancel]</a>

To download the template, click [\[ DOWNLOAD \]](#)

**Note:** Please use the following format xQYYYY\_Reg no. for file name  
(Example: 2Q2015\_IC999999.xls or 2Q2015\_IC999999.xlsx)

\*:Mandatory field

Please click the "Submit" button for file submission.

**SUBMIT**

## Submit NIL Return

IV.4 For NIL return, please tick the box next to “Confirm Nil Return” and enter the required information, then press the “SUBMIT” button. Once submitted, the information cannot be changed using the eService.

The screenshot shows the user interface for submitting a quarterly return on complaints. On the left, there's a sidebar with icons for General Information, Quarterly Return on Complaints (selected), Annual Return, View Submission History, and Online Demo. The main area has a title 'Uploading Quarterly Return On Complaints'. It contains several input fields: Year (2014), Quarter\* (First Quarter), PI MPF Reg No. (IC999999), PI Name (Lucky Insurance Consultants Limited), Confirm Nil Return (checkbox checked), Contact Person\* (Ms Chan), Position\* (Manager), Telephone No.\* (34567890), Fax No. (empty), and Email Address (empty). A note at the bottom says '\*:Mandatory field'. At the bottom right is a large orange 'SUBMIT' button.

A | A | 繁體 | User Manual | Security Tips | Change Password | Logout

Home > Quarterly Return on Complaints

Welcome Lucky Insurance Consultants Limited  
Last Login Attempt:10/12/2014 12:20 Successful

**Uploading Quarterly Return On Complaints**

Year:	2014
Quarter*:	First Quarter
PI MPF Reg No:	IC999999
PI Name:	Lucky Insurance Consultants Limited
Confirm Nil Return:	<input checked="" type="checkbox"/>
Contact Person*:	Ms Chan
Position*:	Manager
Telephone No.*:	34567890
Fax No:	
Email Address:	

\*:Mandatory field

**SUBMIT**

## Submission Date & Time, and Submission ID Reference Number

IV.5 After pressing the “SUBMIT” button, the submission date and time, and Submission ID reference number will be shown.

The screenshot shows a web interface for the Mandatory Provident Fund Schemes Authority. At the top, there are links for 'Home', 'User Manual', 'Security Tips', 'Change Password', and 'Logout'. The logo of the MPA is on the left. The main content area has a title 'Uploading Quarterly Return On Complaints'. It displays a message: 'Submission has been received on Dec 10, 2014 3:16:23 PM. Submission ID reference number: PIQCR-141210-00002'. To the left is a vertical menu bar with five items: 'General Information' (selected), 'Quarterly Return on Complaints' (highlighted in dark blue), 'Annual Return', 'View Submission History', and 'Online Demo'. The 'Quarterly Return on Complaints' item has a small chart icon next to it.

Relevant online demonstrations are available at

<https://eservices.mpfa.org.hk/eservice/eng/demo.do>

## V. ANNUAL RETURN

### Annual Return to be Delivered by MPF Principal Intermediaries

V.1 Principal Intermediaries can click on the “Annual Return” button on the left menu bar to submit an annual return to the MPFA. Below is the first screen page for input:

General Information  
Quarterly Return or Complaints  
Annual Return  
View Submission History  
Online Demo

Annual Return

SECTION I SECTION II SECTION III SECTION IV Summary Confirmation

Welcome: Tai Tai Insurance Company Limited  
Last Login Attempt:04/12/2014 14:36 Successful

Annual Return to be Delivered by MPF Principal Intermediary  
For the period 1 January to 31 December 2014  
(under section 34ZO of the Mandatory Provident Fund Schemes Ordinance, Cap.485 ("MPFSO"))

SECTION I - PARTICULARS OF THE MPF PRINCIPAL INTERMEDIARY

Name in English:	Tai Tai Insurance Company Limited
Name in Chinese (if any):	大大保險有限公司
MPF Registration No.:	IC999997
Name of Contact Person:	
Telephone No. of Contact Person:	
E-mail Address of Contact Person:	

SAVE AS DRAFT      NEXT

### Useful Buttons and Notes

V.2

<b>SAVE AS DRAFT</b>	An incomplete annual return can be saved as a draft and retrieved for further input prior to submission.
<b>[ Add   Delete ]</b>	MPF schemes can be added when necessary and wrongly-selected MPF schemes can be deleted.
<b>Note</b>	By moving a cursor to the Note No. next to certain terms, further elaboration will appear.

## Declaration & Warning Message

V.3 After entering relevant business information and statistics, please read the declaration and warning message carefully, then tick the declaration boxes and enter the name and position of the authorized person. Please see below:

The screenshot displays the MPFA Annual Return system interface. On the left, a vertical navigation bar lists several options: General Information, Quarterly Return on Complaints, Annual Return (which is currently selected and highlighted in dark blue), View Submission History, and Online Demo. The main content area is titled "Annual Return". A horizontal progress bar at the top indicates the current step: SECTION I, SECTION II, SECTION III, SECTION IV (highlighted in orange), Summary, and Confirmation. Below the progress bar, the title "SECTION IV - DECLARATION" is displayed. Under this section, there are four statements each preceded by a checkbox:

- We confirm that we have in place procedures and controls to ensure compliance with Part 4A of the MPFSO.
- We declare that to the best of our knowledge and belief, the information given in this Annual Return is correct and complete.+
- We confirm that the person completing and submitting this Annual Return is a person duly authorized by the Principal Intermediary, with the authority to do so. The Principal Intermediary and the authorized person will be responsible for the information provided.
- We confirm that we have read the *Personal Information Collection Statement* ("PICS") and understand our rights and obligations in relation to the personal data provided by us to the MPFA and consent to the manner in which the personal data may be used or dealt with as specified in the PICS.

Below these declarations is a table with three rows:

Name of MPF Principal Intermediary	Tai Tai Insurance Company Limited
Name of Person Authorized by the Principal Intermediary for Completing and Submitting this Annual Return	(empty)
Position of this Authorized Person	(empty)

**+Warning:** Section 43E(1) of the MPFSO makes it an offence punishable with a maximum of 1 year's imprisonment and a fine of \$100,000 for the first occasion and 2 years' imprisonment and a fine of \$200,000 on each subsequent occasion for a person who makes a statement that the person knows to be false or misleading in a material aspect, or recklessly makes a statement which is false or misleading in a material aspect.

At the bottom of the page are four buttons: "SAVE AS DRAFT" (blue), "CANCEL" (red), "BACK" (orange), and "NEXT" (orange).

## Personal Information Collection Statement (“PICS”)

V.4 The PICS will appear when moving the cursor to “*Personal Information Collection Statement*” and clicking on the words.

## Summary Page

V.5 When all the required information has been entered, a summary page will appear showing all the information. Please read this carefully and ensure that all the information is CORRECT before pressing the “CONFIRM & SUBMIT” button. Once submitted, the information cannot be changed using the eService.

V.6 The summary page can still be saved as a draft and printed out before submission.

A A A | 繁體 | User Manual | Security Tips | Change Password | Logout

Home > Annual Return

Welcome Tai Tai Insurance Company Limited  
Last Login Attempt:04/12/2014 16:31 Successful

**Annual Return**

Print

SECTION I SECTION II SECTION III SECTION IV Summary Confirmation

**Annual Return to be Delivered by MPF Principal Intermediary**  
**For the period 1 January to 31 December 2014**

(under section 34ZO of the Mandatory Provident Fund Schemes Ordinance, Cap.485 ("MPFSO"))

**SECTION I - PARTICULARS OF THE MPF PRINCIPAL INTERMEDIARY**

Name in English:	Tai Tai Insurance Company Limited
Name in Chinese (if any):	大大保險有限公司
MPF Registration No.:	IC999997
Name of Contact Person:	Chan Tai Man

:

:

:

:

#### SECTION IV - DECLARATION

<input checked="" type="checkbox"/>	We confirm that we have in place procedures and controls to ensure compliance with Part 4A of the MPFSO.
<input checked="" type="checkbox"/>	We declare that to the best of our knowledge and belief, the information given in this Annual Return is correct and complete.+
<input checked="" type="checkbox"/>	We confirm that the person completing and submitting this Annual Return is a person duly authorized by the Principal Intermediary, with the authority to do so. The Principal Intermediary and the authorized person will be responsible for the information provided.
<input checked="" type="checkbox"/>	We confirm that we have read the <i>Personal Information Collection Statement</i> ("PICS") and understand our rights and obligations in relation to the personal data provided by us to the MPFA and consent to the manner in which the personal data may be used or dealt with as specified in the PICS.

Name of MPF Principal Intermediary	Tai Tai Insurance Company Limited
Name of Person Authorized by the Principal Intermediary for Completing and Submitting this Annual Return	Chan Tai Man
Position of this Authorized Person	Director

**+Warning:** Section 43E(1) of the MPFSO makes it an offence punishable with a maximum of 1 year's imprisonment and a fine of \$100,000 for the first occasion and 2 years' imprisonment and a fine of \$200,000 on each subsequent occasion for a person who makes a statement that the person knows to be false or misleading in a material aspect, or recklessly makes a statement which is false or misleading in a material aspect.

**SAVE AS DRAFT**

**CANCEL**

**BACK**

**CONFIRM & SUBMIT**

#### Submission Date & Time, and Submission ID Reference Number

V.7 After pressing the “CONFIRM & SUBMIT” button, the submission date and time and Submission ID reference number will be shown.

The screenshot shows the MPFA Annual Return submission confirmation page. At the top, there is a navigation bar with links for Home, User Manual, Security Tips, Change Password, and Logout. The main content area has a header "Annual Return". On the left, a sidebar menu lists "General Information", "Quarterly Return on Complaints", "Annual Return" (which is highlighted in dark blue), "View Submission History", and "Online Demo". The main content area displays the following information:

- Submission has been received on 08/12/2014 12:34.
- Submission ID reference number: PIANR-141208-00001
- A progress bar at the bottom indicates the submission process: SECTION I, SECTION II, SECTION III, SECTION IV, Summary, Confirmation.
- A note below the progress bar states: "If you need to retrieve the file of your submitted annual return for record (save or print), please click **"View Submission History"** on the left menu bar and then select the appropriate download link."

Relevant online demonstration is available at

<https://eservices.mpfa.org.hk/eservice/eng/demo.do>

## Continuing Professional Development Annual Return by Subsidiary Intermediaries (Individuals)

V.8 Subsidiary Intermediaries (Individuals) can click on the “CPD Annual Return” on the left menu bar to submit an annual return to the MPFA. Please see below:

The screenshot shows the MPFA CPD Annual Return submission interface. At the top, there is a navigation bar with icons for home, font size, and user information, along with links for User Manual, Security Tips, Change Password, and Logout. Below the navigation bar, the page title is "Submit CPD Annual Return". On the left, a sidebar menu includes "General Information", "CPD Annual Return" (which is highlighted in orange), "View Submission History", and "Online Demo". The main content area starts with the heading "Continuing Professional Development Annual Return by a Subsidiary Intermediary (Individual)" and a note about section 34ZD of the MPFSO. It then asks for "A. PARTICULARS OF SUBSIDIARY INTERMEDIARY" and provides fields for name in English and Chinese, MPF registration number, mobile telephone number, and residential address. Below this, it asks for "B. CONTINUING PROFESSIONAL DEVELOPMENT (CPD)" and asks for the number of hours attended at core and non-core CPD activities.

Welcome C-SI-003719 Last Login Attempt:07/01/2015 16:23 Failed

Home > CPD Annual Return

**Submit CPD Annual Return**

**General Information**

**CPD Annual Return**

**View Submission History**

**Online Demo**

**Continuing Professional Development Annual Return by a Subsidiary Intermediary (Individual)**

(under section 34ZD of the Mandatory Provident Fund Schemes Ordinance, Cap.485("MPFSO"))

**A. PARTICULARS OF SUBSIDIARY INTERMEDIARY**

Please complete the following particulars:

Name in English (same as HKID Card) :	Chan Tai Man
Name in Chinese (if any) (same as HKID Card):	陳大文
MPF Registration No.:	999999
Mobile Telephone No.:	<input type="text"/>
Residential Address:	<input type="text"/>

**B. CONTINUING PROFESSIONAL DEVELOPMENT (CPD)**

Please state the number of hours you have attended on core CPD activities and non-core CPD activities respectively<sup>1</sup> in the reporting year of 2014

Number of Hours	
Core CPD activities:	<input type="text"/>
Non-core CPD activities:	<input type="text"/>

## Declaration & Warning Message

V.9 After entering the required information, please read the declaration and warning message carefully, and then tick the declaration boxes.

<sup>1</sup>Please refer to the Guidelines on Continuing Training for Subsidiary Intermediaries.

### C. DECLARATION

<input type="checkbox"/>	I certify that I have read the attached <i>Personal Information Collection Statement</i> ("PICS"). I understand my rights and obligations in relation to personal data provided by me to the MPFA and agree to the manner in which the MPFA may use or deal with the data as set out in the PICS.
<input type="checkbox"/>	For the purpose of my ongoing registration as a subsidiary intermediary and any purpose incidental thereto, I consent to the disclosure or release of my personal data or other information by my principal intermediary/intermediaries which I was/am/will be attached to the MPFA and hereby authorize the MPFA to request for such disclosure or release and to release my personal data to my principal intermediary/intermediaries.
<input type="checkbox"/>	For the purposes of monitoring my compliance with the MPF continuing training requirements as specified by the MPFA pursuant to s.34ZP of the Mandatory Provident Fund Schemes Ordinance (Cap.485) ("MPFSO") and my ongoing registration as a subsidiary intermediary, and any purpose incidental thereto, I consent to my principal intermediary/intermediaries which I was/am/will be attached to and the provider(s) of MPF training that is specified by the MPFA under the MPFSO ("MPF Training") disclosing and transferring my personal data (including MPF registration number and the name, date and training hours of the MPF training that I have attended) and other information and supporting evidence held by them to the MPFA. I also consent to the MPFA carrying out matching or comparison of the personal data or other information so disclosed or transferred by my principal intermediary/intermediaries or the provider(s) of MPF Training with my personal data or other information collected or held by the MPFA.
<input type="checkbox"/>	I understand that the results of the matching procedures and comparison mentioned in this CPD Annual Return may result in the MPFA suspending or revoking any registration of myself as a subsidiary intermediary, and/or exercising any other powers conferred by or under the MPFSO, if the results show that I have failed to comply with any MPF continuing training requirements.
<input type="checkbox"/>	I declare that to the best of my knowledge and belief, the information given in this CPD Annual Return is correct and complete. <small>Note</small>

**Note:** **Warning:** Section 43E(1) of the MPFSO makes it an offence punishable with a maximum of 1 year's imprisonment and a fine of \$100,000 for the first occasion and 2 years' imprisonment and a fine of \$200,000 on each subsequent occasion for a person who makes a statement that the person knows to be false or misleading in a material aspect, or recklessly makes a statement which is false or misleading in a material aspect.

**CONFIRM  
& SUBMIT**

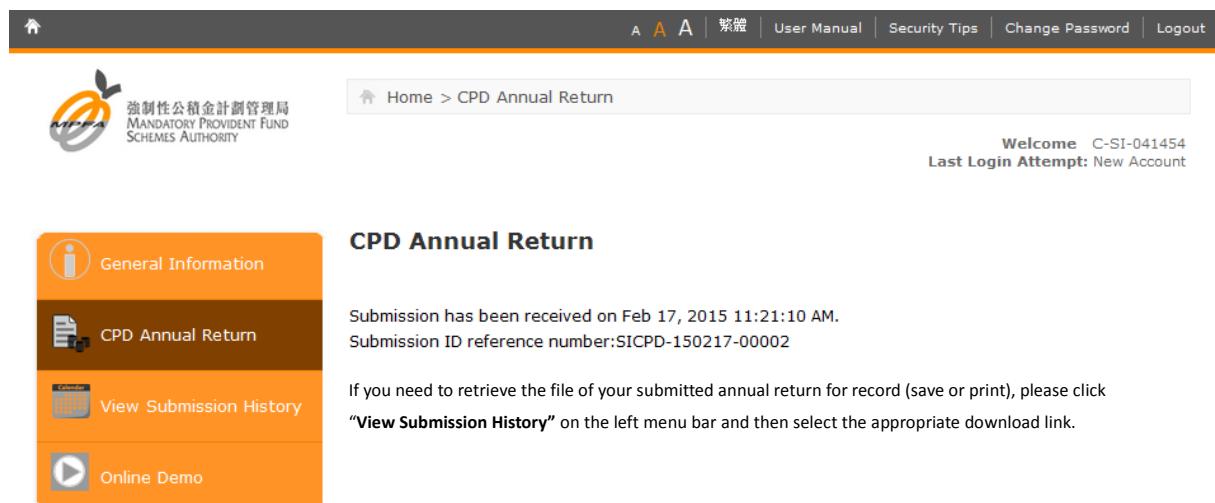
## Confirm & Submit

V.10 Please ensure that the input information entered is **CORRECT** before pressing the "CONFIRM & SUBMIT" button.

---

## Submission Date & Time, and Submission ID Reference Number

V.11 After pressing the “CONFIRM & SUBMIT” button, the submission date and time, and Submission ID reference number will be shown.



The screenshot shows a web interface for the Mandatory Provident Fund Schemes Authority (MPFA). At the top, there is a navigation bar with icons for home, font size, and language (Traditional Chinese), followed by links for User Manual, Security Tips, Change Password, and Logout. Below the navigation bar is the MPFA logo and name. The main content area has a breadcrumb navigation (Home > CPD Annual Return) and a welcome message (Welcome C-SI-041454). It also displays the last login attempt (New Account). The central part of the page is titled "CPD Annual Return" and contains a message stating that the submission was received on Feb 17, 2015 at 11:21:10 AM, with a submission ID of SICPD-150217-00002. It also provides instructions for retrieving the submitted annual return file via the "View Submission History" link in the left sidebar. The left sidebar features four options: General Information, CPD Annual Return (selected), View Submission History, and Online Demo.

Relevant online demonstration is available at

<https://eservices.mpfa.org.hk/eservice/eng/demo.do>

## VI. VIEW SUBMISSION HISTORY

VI.1 Principal Intermediaries and Subsidiary Intermediaries (Individuals) can view their submission history by clicking on the “View Submission History” button on the left menu bar.

VI.2 Submitted annual returns which cover the last reporting period and/or quarterly returns on complaints submitted in the past eight quarters may also be downloaded.

The screenshot shows the "View Submission History" page of the MPFA website. The left sidebar has links for General Information, Quarterly Return on Complaints, Annual Return, View Submission History (which is selected), and Online Demo. The main area has search fields for Type and Status, and a "SUBMIT" button. A table lists two submissions:

Submission ID	Date	Type	Status	Download
PIQCR-141210-00001	10/12/2014 10:04:07	PIQCR Quarterly Return On Complaints (Q1 2014)	Submitted	
PIANR-141208-00001	08/12/2014 12:34:37	PIANR PI Annual Return	Submitted	

### Downloading, Saving and Printing Out Submitted Annual Return(s) / Quarterly Return(s) on Complaints

VI.3 Submitted annual return(s) and/or quarterly return(s) on complaints can be downloaded by clicking shown in the “Download” column. The downloaded annual return(s) and/or quarterly return(s) on complaints can also be printed out and saved for record purposes.

PI Annual Return - Windows Internet Explorer

https://eservices.webuat/eservice/eng/m

Tai Tai Insurance Company Limited Attempt:08/12/2014 12:26 Successful

Home > View Submission History

PI Annual Return

強制性公積金計劃管理局  
MANDATORY PROVIDENT FUND  
SCHEMES AUTHORITY

Annual Return  
Submission ID:PIANR-141208-00001

08/12/2014 12:34

**Annual Return to be Delivered by MPF Principal  
Intermediary  
For the period 1 January to 31 December 2014**

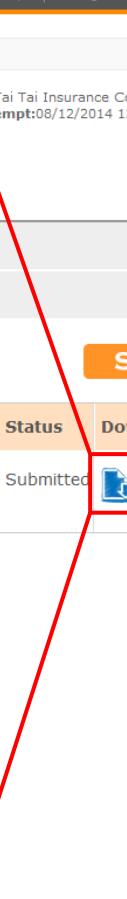
(under section 34ZO of the Mandatory Provident Fund Schemes Ordinance, Cap.485 ("MPFSO"))

**SECTION I - PARTICULARS OF THE MPF PRINCIPAL INTERMEDIARY**

Name in English:	Tai Tai Insurance Company Limited
Name in Chinese (if any):	大大保險有限公司
MPF Registration No.:	IC999997
Name of Contact Person:	Chan Tai Man

**SUBMIT**

Status	Download
Submitted	



Relevant online demonstrations are available at  
<https://eservices.mpfa.org.hk/eservice/eng/demo.do>

## VII. ONLINE DEMONSTRATION

VII.1 Intermediaries can click on “Online Demo” on the top and left menu bars to view an online demonstration on how to use the eService. Please see below:

The screenshot shows the MPFA eService website. At the top, there is a navigation bar with links: Mobile App, User Manual, **Online Demo** (which is circled in red with a red arrow pointing to it), Security Tips, and 中文. Below the navigation bar is the MPFA logo and the text "強制性公積金計劃管理局 MANDATORY PROVIDENT FUND SCHEMES AUTHORITY". To the right is the "eService" logo with a globe icon. The main content area features a photograph of three people in professional attire (two men and one woman) looking at a computer screen together. To the right of the photo is a login form titled "Subsidiary Intermediary". The login form includes fields for "Login ID" and "Password", a "Forgot Password?" link, and a CAPTCHA field displaying the numbers "1791". Below the CAPTCHA is a note: "Please enter the number as shown in this box. If you can't see the number clearly, please click refresh to get another set of number." There is a "Refresh" button next to the CAPTCHA and a "SUBMIT" button at the bottom. The background of the page has orange and yellow wavy patterns.

[Disclaimer](#) | [System Requirement](#) | [System Maintenance Schedule](#) | [Privacy Policy](#) | [Terms and Conditions](#) | [Contact Us](#)  
Best viewed with Internet Explorer 8.0 or above with 1024 X 768 resolution

A A A | 繁體 | User Manual | Security Tips | Change Password | Logout



強制性公積金計劃管理局  
MANDATORY PROVIDENT FUND SCHEMES AUTHORITY

Home > General Information

Welcome Tai Tai Insurance Company Limited  
Last Login Attempt:04/12/2014 16:31 Successful

## Principal Intermediary

- General Information
- Quarterly Return on Complaints
- Annual Return
- View Submission History
- Online Demo

### General Information

Print

Name:	Tai Tai Insurance Company Limited 大大保險有限公司
MPF Registration No.:	IC999997
Frontline Regulator(s):	Insurance Authority
Status:	Active

Basic Information Type A Regulatee Qualification Responsible Officer Compliance Officer Contact Person

Business Registration No.:	12345678
Email Address:	xxx@taitai.com
Telephone No.:	23456789
Fax No.:	45674567

Address of Principal Place of Business in Hong Kong (English):

A A A | 繁體 | User Manual | Security Tips | Change Password | Logout



強制性公積金計劃管理局  
MANDATORY PROVIDENT FUND SCHEMES AUTHORITY

Welcome C-SI-003719 Last Login Attempt:07/01/2015 09:26 Successful

Home > General Information

## Subsidiary Intermediary

- General Information
- CPD Annual Return
- View Submission History
- Online Demo

### General Information

Print

Name:	Chan Tai Man 陳大文
MPF Registration No.:	999999
Frontline Regulator(s):	Insurance Authority
Status:	Active

Registration Information Basic Information Regulatee Qualification

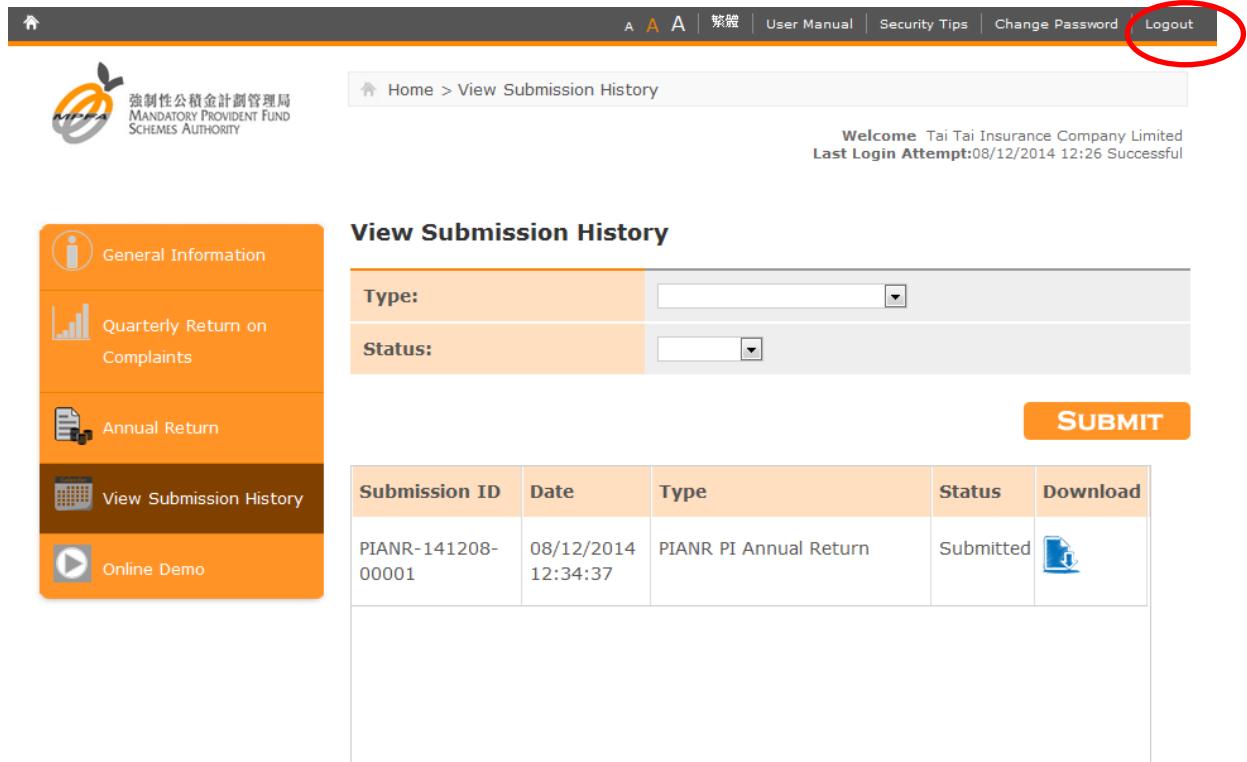
Please find below your registration history of MPF intermediary for the past 3 years:

Registration Date	Revocation Date	Revocation on Disciplinary Ground
30/12/2012		

Disqualification Period (if applicable):

## VIII. LOG OUT

VIII.1 Intermediaries should log out of the eService by clicking on “Logout” at the top right hand corner after completing their business on the site.



The screenshot shows the homepage of the Mandatory Provident Fund Schemes Authority (MPFA) eService. At the top, there is a navigation bar with icons for home, search, and language selection (English), followed by links for User Manual, Security Tips, Change Password, and Logout. The Logout link is highlighted with a red circle and an arrow pointing to it. Below the navigation bar, the MPFA logo and name are displayed. A welcome message for 'Tai Tai Insurance Company Limited' is shown, along with a last login attempt timestamp. The main content area is titled 'View Submission History'. On the left, a sidebar menu lists 'General Information', 'Quarterly Return on Complaints', 'Annual Return', 'View Submission History' (which is currently selected and highlighted in dark blue), and 'Online Demo'. The 'View Submission History' section contains two dropdown menus for 'Type:' and 'Status:', and a large orange 'SUBMIT' button. A table below shows one submission entry:

Submission ID	Date	Type	Status	Download
PIANR-141208-00001	08/12/2014 12:34:37	PIANR PI Annual Return	Submitted	